

PROFESSIONAL SUMMARY

Tax professional with extensive experience providing tax consulting, compliance, research, and business advisory services to individuals, partnerships, S-Corporations, C-Corporations, estates, trusts, nonprofits, and high-net-worth clients. Strong background in tax planning, financial analysis, operational consulting, and client relationship management gained through Big Four firms, regional CPA firms, and independent consulting engagements. Experienced leveraging AI technologies including ChatGPT, Claude, and Intuit Internal AI to research complex tax issues, improve workflow efficiency, and enhance client service. Advanced experience with CCH Tax (Individual & Business), Lacerte, SurePrep, ProConnect, and UltraTax.

CORE COMPETENCIES

Tax Research & Planning • Individual, Partnership & Corporate Taxation • High-Net-Worth Tax • Estate & Trust Tax • Tax Compliance • Business Advisory • Financial Analysis • Tax Technology • AI-Assisted Research • CCH Tax (Individual & Business) • Lacerte • SurePrep • ProConnect • UltraTax • ChatGPT • Claude • Intuit Internal AI • Microsoft Office

CONSULTING EXPERIENCE

BUSINESS PROCESS ADVISORY, New York, NY January 2008 – Present

Tax Consultant

Work independently and in conjunction with accounting, public, and private firms in a consultative capacity supporting tax, accounting, audit, financial analysis, and business advisory engagements. Ensure client objectives are met through proactive planning, technical research, operational analysis, and practical business solutions. Audit transaction history, financial records, management controls, and tax information while reviewing business standards and operating procedures to improve efficiency and compliance. Prepare business, sales and use, corporate, and individual tax filings while providing ongoing advisory services to business owners

Intuit – Business / JDA / TaxFyle

- Research, review, and advise clients on Individual, Partnership, C-Corporation, S-Corporation, Estate, Trust, Gift, Non-Profit, and High-Net-Worth tax matters.
- Provide consultative tax guidance to business owners and commercial clients through Intuit's Expert Network.
- Review complex individual and business tax returns for regional and mid-sized CPA firms while identifying tax planning opportunities and resolving technical issues.
- Utilize ChatGPT, Claude, and Intuit Internal AI to research tax law, analyze complex tax scenarios, validate reporting positions, and improve client response times.
- Prepare and review returns using **CCH Tax (Individual & Business), Lacerte, SurePrep, ProConnect, and UltraTax.**
- Completed Intuit Tax Level I & II Certifications with additional advanced training covering multi-state taxation, foreign income, Schedule C businesses, investments, rental activities, and complex reporting situations.

ADDITIONAL EXPERIENCE

KPMG, New York, NY October 2021 – January 2022

Internal Audit Consultant (JPMorgan Chase)

- Reviewed audit workpapers, validated remediation activities, and tested operational controls supporting SOX compliance and corporate governance.
- Evaluated third-party risk controls, regulatory requirements, and legal governance standards while coordinating with internal audit teams.

PRUDENTIAL INSURANCE, Newark, NJ July 2013 – January 2014

Audit Consultant

- Performed SOX 404 control testing across payroll, employee benefits, investments, tax, and information technology processes.
- Worked with management to evaluate deficiencies and support remediation efforts to strengthen internal controls.

ERNST & YOUNG, LLP, New York, NY July 2004 – October 2005

Internal / External Auditor

- Performed SOX 404 compliance testing, financial statement audits, substantive testing, and internal control evaluations for Fortune 500 clients.
- Researched accounting issues, documented business processes, and supported risk assessments across financial reporting engagements.

PRICEWATERHOUSECOOPERS (PWC), New York, NY February 2001 – December 2001

Property Tax Associate

- Provided property tax consulting, technical research, and compliance support for commercial clients.
- Prepared property tax filings and developed recommendations based on tax research and client business needs.

MARRIOTT INC., Rockville, MD January 1997 – January 1999

Property Tax Accountant / Internal Audit

- Audited property tax records, internal controls, and accrual account balances to ensure compliance with company policies.
- Performed analytical reviews, reconciliations, and financial testing supporting property tax reporting and internal audit objectives.

EDUCATION & CERTIFICATIONS

University of Rio Grande, Rio Grande, OH – Accounting • Licensed CPA (Maryland) • Intuit Tax Level I & II Certifications • La Sorbonne, Paris, France – French Language, Culture & Civilization • Mairie de Paris – Contrôle de Gestion et Reporting Sous Excel

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Tax Analyst

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